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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FD 6-49 December 19, 1949

WORLD OUTPUT OF DAIRY PRODUCTS-THIRD QUARTER 1949

Production of manufactured dairy products in the third quarter of 1949 increased in major producing countries over the comparable period of 1948 except in those countries where drought conditions decreased total milk output. Butter and cheese took up the increased milk available for manufacturing, and also a portion of milk supplies previously directed into canned and dried milk uses.

In Denmark, favorable weather in July and August aided growing conditions and pastures were satisfactory in most areas. While rainfall in September was less than normal, the resulting deterioration of grasses and pastures was not sufficiently serious to affect milk production, output of which for the entire third quarter was 23 percent higher than in the same quarter of 1948.

Milk output in the Netherlands rose 11 percent over that of the third quarter a year earlier, largely the result of increased dairy cow numbers and mild weather which provided better than normal grazing conditions. Late July and August rains in Ireland caused a growth in pastures, and milk supplies to creameries during the third quarter were more than 15 percent above the comparable quarter in 1948.

Conditions for production in New Zealand were excellent and the level of butterfat production remained exceptionally high throughout the quarter.

Milk production on farms in the United States was about 1 percent greater than last year, and as consumption of fluid milk and cream remained about the same, increased quantities of whole milk were available for manufacture. Production of milk in both Canada and the United Kingdom was adversely affected by unfavorable weather conditions during the summer months, and output in each country in the third quarter dropped slightly below the levels of last year. This decline was reflected in the reduced output of all manufactured products except cheese, in Canada, and of all dairy products in the United Kingdom.

Butter production in the third quarter of 1949 was 11 percent above that of the same quarter in 1948. Increases occurred in most of the major producing countries, the exceptions being Canada, United Kingdom, and Australia. Canadian milk production for the third quarter was somewhat lower. This, together with legalization of margarine, and other factors, has resulted in lower butter production. Smaller milk production in the

United Kingdom in this quarter decreased the quantity available for manufacturing purposes, a major factor in the 15 percent decline from the comparable quarter in 1948. Australian butter production in this period was 99 percent of last year.

In Denmark, conditions for production in the third quarter were more favorable than in many countries, and butter output there was 34 percent higher than in the same quarter of 1948. Improved supplies to creameries in Ireland in the last two months of the quarter brought butter production for the entire quarter to 15 percent above comparable 1948. The Netherlands' larger milk production resulted in an increase of approximately 8 percent in butter output in the third quarter. Butter production in the United States exceeded the preceding year by 12 percent, reflecting increased milk production, Government price support programs, and smaller quantities of milk used in other processed forms. Other countries showing increases in butter output in the third quarter were Sweden, Switzerland and New Zealand.

Cheese production in the quarter under review rose 4 percent over the same quarter of 1948. Increases were noted in almost all continental countries reporting. In Sweden, where conditions favored a continued upward trend in milk output, the production of cheese was 28 percent higher than a year ago. The Netherlands and Switzerland both showed gains of 4 percent in this period, while Denmark maintained production at approximately the same level as in 1948. In the United Kingdom where reduced milk output resulted in smaller supplies available for manufacturing, cheese production was only 69 percent of the corresponding quarter of 1948. Of the Southern Hemisphere countries, only New Zealand reported an increase. Cheese graded-for-export in the third quarter exceeded the preceding year by 16 percent.

Production of cheese in Canada in the July-September period of 1949 increased 17 percent, largely the result of somewhat greater quantities of milk being diverted to that product in this period. In the United States, cheese output was 3 percent above last year. Cheddar cheese which is produced on a more extensive scale than all other types combined, was 2 percent larger than the comparable quarter in 1948. Output of cheese in Australia was only slightly below that of the third quarter a year ago.

Canned milk manufactured in reporting countries in the July-September quarter of 1949 declined to 85 percent of last year. The Netherlands was the only country of the four reporting in which an increase occurred in this period. In the United Kingdom, the lowered output for the first two months of the quarter was not offset by the improvement which took place in the final month, and production in the quarter was held to 66 percent of a year ago.

Canadian production of canned milk dropped 22 percent, reflecting the smaller amount of milk available in the quarter for the manufacture of concentrated dairy products. Output in the United States fell to 84 percent of last year, accounted for by the reduced production of evaporated milk which is processed in much larger quantity than condensed milk.

Dried milk production in the third quarter of 1949 was 13 percent above the same quarter of 1948. Of the continental countries reporting, only Sweden showed an increase, dried milk output there being 38 percent higher than a year ago. Production in the Netherlands in the third quarter declined to 77 percent of 1948. The United Kingdom's output in this period was down 42 percent from a year earlier.

In this Hemisphere, dried milk output in the United States in the third quarter of 1949 exceeded that of the corresponding quarter of 1948 by 24 percent. This was accounted for in the greatly increased production of non-fat solids, output of which is continuing at a record level, and which, in the quarter under review, rose approximately 40 percent above a year ago. Output in Canada of both types of dried milk declined in the third quarter, again the result of smaller milk supplies being available for concentrated product manufacture. Total dried milk output there was only 81 percent of third quarter 1948.

Current Conditions Abroad:

Sydney:- Weather has been variable in Australia. In some of the dairying districts, where ample rain has fallen, followed by mild weather, excellent pastures seem to be assured. However, in Victoria, the most important dairy State, rains have been inadequate, and in some areas feed for stock is short.

Stockholm:- The upward trend in the output of dairy products in Sweden continues. Stocks of butter and cheese are reported to be record high, with sizable quantities available for export.

Copenhagen:- Rainfall in Denmark late in the third quarter, and a subsequent spell of favorable weather, encouraged pasture growth. Dairy animals are in good condition.

Dublin:- In Ireland, better than usual conditions for milk production prevailed early in the fourth quarter. However, with the coming of colder weather, pastures deteriorated.

Ottawa:- Both feed and pasture conditions in Canada in the early part of the fourth quarter were favorable for production. Present indications are that milk production for the year 1949 will approximate 1948 output.

Prepared by Regina M. Murray, under the supervision of Floyd E. Davis. Based largely on reports from U. S. Foreign Service Officers.

DAIRY PRODUCTS: Output in principal producing and exporting countries, third quarter (calendar) 1949, with comparisons

Country and product	Average 1934-38	Total 1948	1948 3rd quarter	1948 4th quarter	1949 1st quarter	1949 2nd quarter	1949 3rd quarter	Third quarter 1949/48
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter 1/								
Canada	248,119	284,431	109,828	52,737	30,118	93,168	105,033	96
United States	1,673,328 2/	1,213,010	339,655 2/	254,928	295,105	439,185	380,535	112
Belgium	46,179 3/	66,000	-	-	-	-	-	-
Denmark	400,660	267,199	72,311	63,493	64,815	100,088	97,003	134
France 4/ 5/	444,888	201,410	63,556	54,800	38,964	71,943	-	-
Germany	792,000	-	-	-	-	-	-	-
Ireland	89,400	63,900	28,382	14,348	3,666	24,397	32,645	115
Netherlands	201,000	155,823	53,698	34,797	25,807 2/	61,025	57,864	108
Norway	24,930	19,570	5,185	3,843	4,597	9,771	-	-
Sweden	151,309	197,724	58,010	43,662	44,424 2/	61,662	61,392	106
Switzerland 4/	57,760	30,864	8,638	8,061	5,639	9,460	10,895	126
United Kingdom	44,200	18,772	5,690	3,853	4,525 2/	12,634	4,853	85
Argentina	65,742	-	-	-	-	-	-	-
Union of South Africa	27,725	48,589	8,265	12,049	14,460	11,134	-	-
Australia 6/	437,032	354,834	70,934	121,307	104,741	64,070	70,470	99
New Zealand - total 7/	366,049	341,646	58,352	150,484	116,009	-	-	-
Export gradings 8/	314,753 2/	299,801	47,633 2/	138,381	106,833	33,272	60,531	127
Cheese 9/								
Canada	114,699 2/	86,492 2/	41,395 2/	10,390	2,643	38,917	48,348	117
United States	643,234 2/	1,098,461	310,230 2/	222,103	255,030	392,240	319,040	103
Denmark	68,820	123,237	38,580	26,676 2/	25,353 2/	45,415	38,581	100
France 4/ 5/	363,098	320,203	95,159	91,024 2/	74,370	128,634	-	-
Italy 10/	525,518 11/	441,000	-	-	-	-	-	-
Netherlands 12/	266,549	213,478	75,491	52,943	38,845 2/	87,071	78,647	104
Norway	39,067	30,182	9,093	4,714	8,168	17,268	-	-
Sweden	71,269	113,967	33,865	19,826	27,200 2/	44,436	43,305	128
Switzerland	111,729	101,934	36,561	20,710	16,347	36,345	38,067	104
United Kingdom 12/	109,000	58,554	24,416	10,528	16,845	30,285	16,845	69
Argentina	67,873	-	-	-	-	-	-	-
Union of South Africa	10,195	19,086	3,945	5,009 2/	5,421 2/	3,912	-	-
Australia 6/	49,111	93,417	21,903	38,326	23,513 2/	13,198	21,817	99
New Zealand - total 7/	201,272	203,682	31,158	94,438	71,299	-	-	-
Export gradings 8/	194,175	194,742	17,644	89,459	72,473	32,856	20,422	116

DAIRY PRODUCTS: Output in principal producing and exporting countries, third quarter (calendar) 1949, with comparisons

Country and product	Average 1934-38	Total 1948	1948 3rd quarter	1948 4th quarter	1949 1st quarter	1949 2nd quarter	1949 3rd quarter	Third quarter 1949/48
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk								
Canada 13/	92,377 2/	296,465	105,401	55,650	42,571	95,314	82,385	78
United States 13/	2,469,535 2/	4,513,324 2/	1,336,273 2/	717,119 2/	751,030 2/	1,338,165	1,119,180	84
Cuba 5/	32,564	29,165	10,790	8,711	3,696	9,240	-	-
Denmark	40,785	53,523	15,293	14,645	16,695	24,824	-	-
France 14/	28,953 2/	53,405 2/	19,994 2/	11,287	8,104	22,627	-	-
Netherlands	304,896	137,133	36,253	46,967	57,235 2/	74,527	65,073	179
Switzerland	14,198	14,330	-	-	-	-	-	-
United Kingdom	378,560	187,354	39,604	31,001	31,091 2/	121,318	26,253	66
Argentina	-	-	-	-	-	-	-	-
Australia 6/15/	41,894 2/	133,326	27,202	53,494	29,167 2/	22,944	-	-
New Zealand 5/	11,273	16/	-	-	-	-	-	-
Dried milk 17/								
Canada	23,488 2/	81,573	28,696	16,853	10,905	27,804	23,318	81
United States 5/	203,555 2/	851,619 2/	211,820 2/	155,020 2/	225,540 2/	371,165	262,395	124
Belgium	5,500	3,761	-	-	-	-	-	-
Denmark	2,205	10,977	3,243	1,724	2,374	3,642	-	-
France 14/	7,685	4,173	1,093	979	990	1,552	-	-
Netherlands	56,438	53,945	21,473	6,289	4,103 2/	33,754	16,548	77
Sweden	1,351	24,733	7,966	4,642	5,868 2/	10,282	11,010	138
Switzerland	2,381	-	-	-	-	-	-	-
United Kingdom	33,600	77,505	15,411	5,377 2/	10,841 2/	32,614	8,870	58
Argentina	18/	-	-	-	-	-	-	-
Australia 6/	16,971 2/19/20/	71,906 2/	15,056	28,793	21,613	14,722	-	-
New Zealand 21/	17,429	16/	-	-	-	-	-	-

1/ Creamery butter. 2/ Revised. 3/ These figures represent controlled production of butter. 4/ Total production. 5/ Less than a 5-year average. 6/ Production year beginning July 1. 7/ Production year beginning April 1. 8/ Marketing year beginning August 1. 9/ Factory cheese. 10/ Total cheese, and includes cheese made from the milk of sheep and goats. 11/ Estimates. 12/ Includes farm cheese. 13/ Both bulk and case goods. 14/ For 1937 only. 15/ Revised to include concentrated milk. 16/ Canned and dried milk reported at 73,345,000 pounds in 1948. 17/ Total dried-whole and dried-skim milk for human consumption. 18/ Quantity small. 19/ Includes infants' food, health beverages, etc. 20/ Production of dried-whole and dried-skim milk was 50,773,000 pounds in 1948. 21/ For 19[illegible] only.

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UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FD 5-49 November 7, 1949

INDICATED 1949 WORLD MILK PRODUCTION

Milk production in all major producing countries increased during 1949 and is indicated at a total approximately 4 percent above last year, based upon information available in the Office of Foreign Agricultural Relations. This will exceed prewar production by about 5 percent.

A production increase of 7 percent over 1948 is expected in Western Europe as a result of 4 percent more dairy cows than last year in that area and a higher production per cow in almost every country due to more plentiful feed supplies. Australian and New Zealand milk production is up 6 percent from last year due to more cows, good pastures and the encouragement of the United Kingdom market. The United States and Canada probably will increase their production of milk by about 1 percent from last year in spite of a reduction in cow numbers from 1948 in both countries.

The countries besides the United States and Canada which will exceed prewar production in 1949 are the United Kingdom, Norway, the Netherlands, Australia and New Zealand. During the year more substantial progress was made from low wartime levels in Austria, Denmark and Ireland. Southern European countries in general have suffered more continued feed shortages and their dairy industries have not made consistent recovery.

All countries reported as many or more cows than in 1948 except the United States and Canada and in practically every country production per cow increased during the year. The United Kingdom was the only country reporting cow numbers in excess of prewar.

Almost every country has had larger supplies of feed and roughages during 1949 than at any time since before the war. Pastures for most countries were much improved with the exception of a widespread drought during June and July that had localized effects in most countries and was severely felt in France, Switzerland, Czechoslovakia and the United Kingdom.

Milk prices, except in the United States and Canada, have remained about the same or risen slightly during the year. Many countries still rigidly control the prices of dairy products. Feed prices have tended downward in large grain-producing countries; however, the feed prices paid in importing countries have been slower to decline. Additional supplies are apt to be at higher prices to most importing countries within limited exception, since such countries have devaluated their currency in relation to most grain-exporting countries.

Record feed supplies per animal unit in the United States resulted in a 1 percent increase in milk production from 1948 and record production per cow. The 5-year decline in the number of milk cows leveled off in the first six months of 1949 and cow numbers are expected to increase during the coming year. Prices of United States dairy products are committed to government price support in the domestic market. United States exports of dairy products will, however, receive more competition in foreign markets since all other major milk-producing countries have devaluated their currency in relation to the United States dollar and will be able to sell at relatively low prices.

Denmark is currently regaining its prominence as an exporter of dairy products. Danish milk production increased 17 percent over last year as cow numbers reached 93 percent of prewar and good weather provided a long season of succulent pastures. Cows came out of the mild winter in fine condition and held up well in the late season since good yields of hay have made possible supplementing of pasture during dry spells. Danish dairymen have considerable supplies of feed on hand.

The 1949 milk production in Ireland is reported at about 13 percent over last year which is just short of their prewar level. The large increase resulted from a higher production per cow since cow numbers remained about the same as in 1948. The rapidly increasing production has temporarily posed handling and distribution problems. Prices have been closely regulated and the government is paying a special subsidy for farm butter currently discriminated against because of inferior quality. A dairy program has been outlined which will secure better herd sires, offer artificial insemination services, veterinary aid and generally promote better dairy practices. It will be financed by assessing producers 1/4 pence per gallon which will be matched by funds from the Irish Department of Agriculture.

Milk production in the Netherlands and Belgium has been successfully encouraged by the improved feed supplies, sufficient market and government assistance. Milk production in the Netherlands is 2 percent above prewar even though cow numbers are 3 percent short of prewar. Cheese is the only dairy product rationed and the Dutch are working hard to regain prewar export markets and to supply the Belgian market.

Norwegian milk production during 1949 is likely to reach 13 percent above prewar. Rationing of milk, cheese, canned milk and cream ended in August of 1949. Roughage supplies in Norway are sufficient for their increase in cow numbers but indigenous grain production is below last year. Sweden's milk supply is almost at the prewar level. Recent price increases to dairymen will further their efforts to produce milk.

Substantial increases over a year earlier occurred in the United Kingdom during the first half of the year but the dry pastures during July and August depressed production to 1948 levels during those months. Hay yields were good enough to permit some feeding to supplement poor pastures. It appears, however, that United Kingdom milk production will total 13 percent above prewar.

In France and Switzerland increases in milk production during the first half of the year have been offset by drought conditions which dried up pastures, decreased hay yield and forced the sale of some cattle. Their production of milk, however, will be up about 4 percent over 1948 which is 13 percent below prewar production. Domestic supplies of dairy products have been supplemented by larger than usual imports from Netherlands and Denmark.

Czechoslovakian dairying is in a generally chaotic condition as a result of drought during 1949, increasing sterility of its dairy cattle from contagious disease and a widespread shortage of feeds. The brightest prospect is the larger number of young dairy stock which will come into production in the next few years.

The removal of government controls concerning the production of milk in Italy during 1948 did much to encourage its production. Feed supplies have permitted increases in production but they have not yet been in sufficient supply.

Canadian milk production has remained relatively constant for the last 3 years at a level 13 percent above prewar production, while the increase in population has been only slightly more during the same period. Even though Canadian dairymen have increased their milk production, they are now milking 5 percent fewer cows than previous to World War II. This culling of poor producers and better care of the remaining cows will tend to offset the declining prices for milk products and competition from the production of margarine which was legalized this year.

This is one of a series of regularly scheduled articles on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of C. M. Purves, Acting Chairman, Floyd E. Davis, Charles C. Wilson, Jr., Mary E. Long and Stanley Mehr.

MILK: Indicated 1949 production in important producing countries, with comparisons 1/

Countries	Average 1934-38	1948	Indicated 1949
	Million pounds	Million pounds	Million pounds
Canada	15,018	16,645	17,000
United States	105,416	118,337	119,826
Austria	2/ 5,602	3,370	3,800
Belgium	6,790	6,305	6,614
Czechoslovakia	3/ 9,828	4,976	-
Denmark	4/ 11,684	8,982	10,472
Eire	5,090	4,448	5,026
France	5/ 31,457	26,500	27,500
Germany	4/ 53,100	-	-
Italy	6/ 13,750	-	12,700
Netherlands	11,180	9,874	11,442
Norway	4/ 2,954	3,042	3,330
Sweden	4/ 10,238	9,805	10,141
Switzerland 7/	4/ 6,041	5,004	5,200
United Kingdom	18,424	20,085	20,858
Australia 8/	9/ 11,780	12,150	12,758
New Zealand 10/	11/ 9,454	9,520	10,282

1/ Cows' milk. 2/ For the year 1934. 3/ For the year 1937. 4/ For the years 1933-1937. 5/ For the years 1937 and 1938. 6/ For the year 1938. 7/ Production includes goats' milk. 8/ Excludes milk fed to calves. 9/ For the years ending June 30. 10/ Utilization of butterfat converted to milk equivalent on the basis of 4.5 percent fat content. 11/ For the year ending July 31.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, U. S. Foreign Service reports, and other information.

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OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FD 4-49 September 26, 1949

WORLD OUTPUT OF DAIRY PRODUCTS, SECOND QUARTER 1949 [1]

Substantial increases in the production of manufactured dairy products in most of the major producing countries of the world occurred in the second quarter of 1949, as compared with the corresponding period of 1948. In these countries, milk output was greater, and much of this increase was manufactured into dairy products. Production of butter, dried milk and cheese increased 18 percent, 17 percent and 16 percent, respectively, while canned milk production in this quarter was 9 percent lower than that of a year earlier.

Larger milk production in the second quarter of the current year reflected the favorable producing conditions and improved feed situation in the principal producing countries. In the Netherlands, the early growth of pastures, an increase in cow numbers and ample feed supplies resulted in an increase in milk production of approximately 27 percent. With more forage available in Denmark, output of milk rose 18 percent over a year ago. In Switzerland, because of sufficient pasture, and increases in the number of cows and in yield per cow, milk production rose 10 percent over comparable 1948.

Conditions in the principal dairying areas of Australia were favorable for production in the second quarter of 1949, and milk production increased 11 percent in this period. Lower than normal temperatures in New Zealand in April checked pasture growth but milder weather in May and June brought green pastures and resulted in a higher output of butterfat.

Although unfavorable conditions prevailed in Canada, second quarter milk production increased approximately 2 percent over the same quarter of the preceding year. In the United States, good pastures, especially in the manufacturing areas, together with the higher average rate of concentrate feeding, raised milk production in this period 2 percent over corresponding 1948.

Butter production in nearly all the important producing countries increased in the April-June quarter of 1949. In the United Kingdom, favorable pastures and adequate supplies of fodder and other feeds resulted in higher milk production in the second quarter and a butter output higher by 63 percent than that for comparable 1948. Milk deliveries to creameries in Ireland increased substantially in the second quarter of 1949; at the same time, butter production rose 30 percent. This improvement in butter supplies made possible the raising of the butter ration from 6 to 8 ounces per person during this quarter. In the Netherlands and Sweden, where deliveries also were well above those of last year, butter output increased 25 percent and 12 percent, respectively, in the same period. Other continental countries reporting higher butter production in the second quarter of 1949, compared with the same 3 months of 1948, were Denmark and Switzerland.

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[1] Prepared by Regina M. Murray under the supervision of Floyd E. Davis. Based largely on reports from U. S. Foreign Service Officers.

In Australia, butter output rose 10 percent in the second quarter. As indicated by export-gradings, the output of butter in New Zealand was approximately 50 percent higher than in the same quarter last year. Canada maintained butter production in the second quarter of 1949 at about the same level as in the corresponding quarter of 1948. In the United States, butter output continued high, and was 18 percent higher than a year ago.

Cheese production in the 10 countries reporting increased 16 percent in the second quarter of 1949, compared with the same quarter of 1948. Output in the Netherlands was higher than that of any other country in continental Europe, production there being 34 percent above that of 1948. In both Sweden and Switzerland, where conditions for production were favorable, the output of cheese increased approximately one-fifth in the April-June quarter. Production in the United Kingdom rose 69 percent above comparable 1948. In Australia, an increase of 15 percent in cheese produced reflected increased milk production. Cheese gradings-for-export in New Zealand ran 42 percent ahead of the same quarter of 1948.

Both Canada and the United States reported higher cheese production in the second quarter of 1949. In the former country, the increase in milk production in this quarter was diverted to the manufacture of cheese, output of which was 25 percent above that of a year ago. Second quarter production of cheese in the United States rose 10 percent. Most of this increase occurred in the output of cheddar cheese, much more of which is manufactured than any other type. Production of cheese in Denmark and the Union of South Africa, the only other countries reporting, declined below the levels of the same period of 1948.

Canned milk production dropped 9 percent in the second quarter of 1949, the only manufactured dairy product which did not show an increase in this period. Although several countries reported gains in the output of canned milk in the April-June quarter, these increases were not sufficient to compensate for the lower production in this Hemisphere. In Canada, canned milk manufacture was 3 percent below a year ago. A decline of 15 percent in the United States was largely accounted for by a smaller production of evaporated milk which is processed on a much larger scale than condensed milk. In Cuba, fresh milk supplies in the condensery areas were 25 to 30 percent higher than in the second quarter of 1948, and canned milk output in the same period increased 73 percent. Other countries reporting larger production in the second quarter of the current year were the Netherlands, the United Kingdom and Australia.

Dried milk production increased 17 percent in the quarter under review in the 6 countries reporting. Among the countries of continental Europe in which dried milk output was higher than a year ago were Sweden and the Netherlands, with increases of 36 percent and 35 percent, respectively, Total dried milk production in the United States in the second quarter, 19 percent above the corresponding quarter of 1948, was accounted for in the larger manufacture of nonfat solids, production of which has been at a record level each month of the current year. The second quarter output showed a gain of more than 30 percent over a year earlier. Australia was the only other country in which dried milk production was heavier than in the second quarter of 1948, the increase there amounting to 54 percent. In Canada, output of dried milk dropped 2 percent in the second quarter. Production in the United Kingdom was down 9 percent, compared with the corresponding quarter of the preceding year.

Current Conditions Abroad

London - During the summer months, lack of moisture in the United Kingdom caused pastures to parch and to provide much less than the usual amount of grass. Although rains have fallen since mid-July, and pastures have shown some improvement, they have not fully recovered from the moisture deficiency, and milk production continues to be retarded.

Dublin - Although milk production in Ireland was temporarily curtailed by the June and early July drought, late July and August rains caused a phenomenal growth in meadows and pastures, resulting in a feed position which is once more highly favorable, and in larger milk supplies.

The Hague - In the Netherlands, crop and pasture conditions remain satisfactory.

Bern - Pastures in Switzerland are poor. Immediate heavy rains, plus mild temperatures, could improve the situation.

Paris - French dairy production has dropped markedly, largely as a result of poor pasture conditions. On some days, milk arrivals in Paris have been well below demand. Distress sales of livestock for lack of feed are reported.

Havana - Supplies of fresh milk in Cuba will continue at a high level until November, with a probable peak in September and early October.

Ottawa - Dry weather and short pastures in Canada, particularly in the important dairy provinces of Ontario and Quebec, probably will result in reduced milk production in the third quarter.

DAIRY PRODUCTS: Output in principal producing and exporting countries, second quarter (calendar) 1949, with comparisons

Country and product	Average 1934-38	Total 1948	1948 2nd quarter	1948 3rd quarter	1948 4th quarter	1949 1st quarter	1949 2nd quarter	Second quarter 1949/48
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter 1/								
Canada	248,119	284,431	93,492	109,828	52,737	30,118	93,168	100
United States	1,673,328	1,214,482	371,930	339,655	256,400	295,105	439,185	118
Belgium	46,179 2/	66,000	-	-	-	-	-	-
Denmark	400,660	267,199	77,823	72,311	63,493 3/	64,815	100,088	129
France 4/5/	444,888 3/	201,410	56,246	63,556 3/	54,800	38,964	-	-
Germany	792,000	-	-	-	-	-	-	-
Ireland	89,400	63,900	18,758	28,382	14,348	3,666	24,397	130
Netherlands	201,000	155,823	48,356	53,698	34,797 3/	25,807	60,406	125
Norway	24,930	19,570	7,187	5,185	3,843	4,597	-	-
Sweden	151,309	197,724	54,813	58,010	43,662	44,424	61,617	112
Switzerland 4/	57,760	30,864	7,507 3/	8,638 3/	8,061	5,639	9,460	126
United Kingdom	44,200	18,772	7,437	5,690	3,853	4,525	12,141	163
Argentina	65,742	-	24,865	-	-	-	-	-
Union of South Africa	27,725	48,589	11,224	8,265	12,049	14,460	11,134	99
Australia 6/	437,032	354,834	58,329	70,934	121,307 3/	104,741	64,082	110
New Zealand - total 7/	366,049	341,646	29,210	58,352	150,484	-	-	-
Export gradings 8/	314,753	300,533	22,234	47,633	139,113	106,833	33,272	150
Cheese 9/								
Canada	114,699 3/	86,587 3/	31,120	41,465	10,415	2,643	38,917	125
United States	643,234	1,098,003	356,300	310,230	221,645 3/	255,030	392,240	110
Denmark	68,820	123,237	41,226	38,580	26,676 3/	21,604	33,730	82
France 4/5/	363,098 3/	320,203	93,422	95,159 3/	91,024	75,223	-	-
Italy 10/	523,518 11/	441,000	-	-	-	-	-	-
Netherlands 12/	266,549	213,478	68,999	75,491	52,943 3/	38,845	92,593	134
Norway	39,067	30,182	12,489	9,093	4,714	8,168	-	-
Sweden	71,269	113,967	36,281	33,865	19,826	27,200	44,450	122
Switzerland	111,729 3/	101,934 3/	31,125 3/	36,561 3/	20,710	16,347	36,345	117
United Kingdom 12/	109,000	58,554	17,920	24,416	10,528	16,845	30,285	169
Argentina	67,873	-	45,687	-	-	-	-	-
Union of South Africa	10,195 3/	19,086	4,058	3,945 3/	5,009	5,395	3,921	97
Australia 6/	49,111	93,417	11,467	21,903	38,326	23,513	13,201	115
New Zealand - total 7/	201,272	203,682	16,576	31,158	94,438	-	-	-
Export gradings 8/	194,175	194,742	23,108	17,644	89,459	72,473	32,856	142

DAIRY PRODUCTS: Output in principal producing and exporting countries, second quarter (calendar) 1949, with comparisons

Country and product	Average 1934-38	Total 1948	1948 2nd quarter	1948 3rd quarter	1948 4th quarter	1949 1st quarter	1949 2nd quarter	Second quarter 1949/48
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk								
Canada 13/	92,377	296,805	98,405	105,401	55,650	42,571	95,314	97
United States 13/	2,469,535 3/	4,515,345 3/	1,575,790	1,352,225	725,115	740,950	1,333,040	85
Cuba 5/	32,564	29,165	5,326	10,790	8,711	3,696	9,240	173
Denmark	40,785	-	14,131	15,293	-	-	-	-
France 14/	28,953	53,404	17,819 3/	19,995 3/	11,286	8,104	-	-
Netherlands	304,896	137,133	44,142	36,253	46,967 3/	57,235	74,956	170
Switzerland	14,198	14,330	-	-	-	-	-	
United Kingdom	378,560	187,354	91,840	39,604	31,001	31,091	124,634	136
Argentina	-	-	2,743	-	-	-	-	-
Australia 6/15/	41,894	133,364	16,333	27,202	53,494	29,167	22,975	141
New Zealand 5/	11,273	16/	-	-	-	-	-	-
Dried milk 17/								
Canada	23,488 3/	81,921 3/	28,355 3/	28,900	16,997	10,905	27,804	98
United States 5/	203,555 3/	831,495 3/	304,435	210,830	149,970 3/	210,790	361,090	119
Belgium	5,500	-	-	-	-	-	-	-
Denmark	2,205	-	4,365	3,243	-	-	-	-
France 14/	7,685	4,173	1,237 3/	1,093 3/	979	990	-	-
Netherlands	56,438 3/	53,945	24,867	21,473 3/	6,289 3/	4,103	33,510	135
Sweden	1,351	24,733	7,030	7,966	4,642	5,868	9,595	136
Switzerland	2,381	-	-	-	-	-	-	-
United Kingdom	33,600	77,505	34,048	15,411	5,377	10,572	30,912	91
Argentina	18/	-	3,163	-	-	-	-	-
Australia 6/	16,971 3/19/	20/70,611 3/19/	9,540 19/	15,036 19/	28,793 19/	21,613 19/	14,722	154
New Zealand 21/	17,429	16/	-	-	-	-	-	-

1/ Creamery butter. 2/ These figures represent controlled production of butter. 3/ Revised. 4/ Total production. 5/ Less than a 5-year average. 6/ Production year beginning July 1. 7/ Production year beginning April 1. 8/ Marketing year beginning August 1. 9/ Factory cheese. 10/ Total cheese, and includes cheese made from the milk of sheep and goats. 11/ Estimated. 12/ Includes farm cheese. 13/ Both bulk and case goods. 14/ For 1937 only. 15/ Revised to include concentrated milk. 16/ Canned and dried milk reported at 73,346,000 pounds in 1948. 17/ Total dried-whole and dried-skim milk for human consumption. 18/ Quantity small. 19/ Includes infants' food, health beverages, etc. 20/ Production of dried-whole and dried-skim milk was 49,752,000 pounds in 1948. 21/ For 1938 only.

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WASHINGTON, D.C.

FD 3-49 June 11, 1949

WORLD OUTPUT OF DAIRY PRODUCTS, FIRST QUARTER 1949

Production of manufactured dairy products in most of the major producing countries in the first quarter of 1949 was well above that for the same quarter a year earlier and thus continues the upward swing begun in the last quarter of 1948. The larger output of dairy products reflects the increase of milk production which occurred during the same period, most of which was diverted to manufacturing uses. As a result, cheese, dried milk and butter production increased 26, 20 and 14 percent, respectively, while evaporated and condensed milk were the only products that dropped below the first quarter production of 1948.

The increase in production is attributed to a much improved feed situation and in some instances to an increase in the number of milk cows in many of the principal milk producing countries. Larger supplies of milk in many countries made it possible to relax or remove restrictions on utilization, permitting freer diversion of milk to those products which would bring the greatest monetary return.

Although milk cow numbers in Canada and the United States decreased, the production of milk and dairy products increased because of the favorable domestic feed situation. Australian and New Zealand production also reflected improved pasture for dairy herds, but production in the Union of South Africa is somewhat lower than normal, owing to the dry weather early in the year. In Europe, however, the increase in numbers and the larger quantity of indigenous and imported feed supplies have materially increased production in most of the dairy products.

Substantial increases in butter production occurred in the major producing or reporting countries, with the exception of Switzerland and the Union of South Africa. Butter production in Switzerland decreased 15 percent as a result of a bonus being paid for milk used in processing cheese. In the Union of South Africa the butter output reflected the general decrease in milk production.

Output of butter in Denmark was 21 percent larger than a year ago, reflecting an improvement in milk production which occurred in the first 3 months of this year. In the Netherlands, an increase of 52 percent in milk deliveries to plants resulted in a 26 percent rise in the amount of butter produced in the same period.

The butter production in Ireland, in the January-March quarter, was 52 percent above that of 1948. This permitted a sizable increase in the domestic rations, and provided larger quantities for export. The output of milk in the United Kingdom during the first quarter of 1949 was considerably greater than that of a year earlier. The increase in production provided sufficient amounts of fluid milk for unrationed market demands, and permitted an increase in butter production well above that of 1948. Last year smaller amounts of milk were used in fluid form because of ration restrictions.

Largely as a result of the recovery from unfavorable producing conditions in the principal dairy areas in Australia, during the opening months of the current year, butter production in that country was maintained at a level comparable to 1948. In New Zealand, pastures were good throughout the quarter under consideration and butter-gradings for export increased 17 percent. This was partly due to continued butter rationing needed to maintain current exports at a high level.

Canadian milk production in the first quarter of 1949 showed little change from that of a year ago, but butter output in the same quarter was approximately 6 percent larger. During this same period 11 million pounds of margarine were produced compared to none a year earlier. In the United States an increase of 20 percent in the production of butter is attributed to larger milk production and a lessening of the demand for whole milk especially by condenseries.

Cheese production in the first quarter of 1949 showed the largest increase of any manufactured dairy product. In Switzerland, the output of cheese in this period was 21 percent above that of a year ago. This gain was achieved at the expense of butter production in anticipation of re-entrance by the Swiss into some of their prewar export markets. Larger quantities of cheese were manufactured in Denmark and the Netherlands, as conditions for production in both countries were much more favorable in the initial quarter of the current year than in the same quarter of 1948. This continues the general upward trend in Danish cheese output for the fifth consecutive year. Cheese output in the United Kingdom also showed a marked rise in this period. The Australian cheese output showed an increase of 8 percent in the first quarter of 1949 over the first quarter of the preceding year. This was due primarily to the increased milk production in March when the output was larger than that of any corresponding month in recent years. While data for total cheese manufactured in New Zealand are not available, it is indicated that production will be well above 1948. Cheese-gradings for export in the first 3 months of 1949 were 12 percent larger than in the corresponding period a year ago.

Production of cheese in the United States, for January through March, was approximately 22 percent larger than in the same period of 1948 and was the largest ever attained for that quarter. Canadian cheese production declined 26 percent as a result of larger quantities of milk being diverted to other uses, particularly to butter. However, cheese production is expected to increase and probably attain a higher level than last year.

Evaporated and condensed milk were the only manufactured dairy products whose output declined during the first quarter of 1949. While Canada, the United Kingdom and the Netherlands increased their manufacture of these products in this quarter, their output is small compared with the United States, where production was 14 percent below that of 1948. This decrease occurred in evaporated milk which is processed on a much larger scale than condensed milk. In the first quarter, evaporated milk production in this country dropped about 17 percent below the same quarter of last year. The production of evaporated and condensed milk in Australia, the only other country reporting, was down 20 percent in the first 3 months of 1949 compared with the corresponding 3 months of 1948.

Dried milk production in the first quarter of 1949 showed an increase over the corresponding period of 1948. Both the United States and Canada, two of the major producers of dried milk products, experienced a decrease in the production of dried whole milk, but substantially accelerated the output of dry non-fat milk. The net increase in dried milk products for these countries was 32 percent and 42 percent, respectively, in the first quarter of 1949 compared with January-March, 1948.

The United States production increase in dry non-fat milk of 46 percent is largely the result of increased milk production, diversion of milk from evaporated and dried whole milk to butter production, combined with continued Government purchases for export and price support. The Netherlands and Australia were the only other countries to show an increase in production of dried milk in the first quarter of 1949. Output in the United Kingdom, on the other hand, was only 47 percent of a year ago.

Current Conditions Abroad

Canada: Livestock came through the winter in good condition. Pasture growth is good. Farmers are well supplied with feeds.

Cuba: In May, seasonal rainfall over most of the Island improved pastures rapidly, causing a marked increase in milk production, and giving impetus to the output of canned milk and other dairy products.

Ireland: Weather and pasture conditions are favorable. Dairy output shows improvement.

United Kingdom: Conditions for milk production continue favorable. Pastures have developed as a result of the mild weather and supplies of fodder and other feeds are adequate.

The Netherlands: Dairy cattle came through the comparatively mild winter in excellent condition. Feeds are plentiful.

Denmark: Warm weather and ample rainfall in May provided good growing conditions. Pastures are excellent.

France: Dairy production, aided by timely spring rains which have eased the threat of drought, has been increasing seasonally. Since the middle of May, production of dairy products has been adequate to meet practically all current domestic requirements.

Switzerland: Rainfall in April and May, after a dry early spring, resulted in a sharp revival of pasture growth.

Australia: The outlook for dairy production is generally good. Dairy cattle are slightly more numerous and face the winter in good condition, with feed available for at least several months.

New Zealand: Agricultural conditions continue generally satisfactory.

Prepared by Regina M. Murray under the supervision of Floyd E. Davis. Based largely on reports from U. S. Foreign Service Officers.

DAIRY PRODUCTS: Output in principal producing and exporting countries, first quarter (calendar) 1949, with comparisons

Country and product	Average 1934-38	Total 1948	1948 1st quarter	1948 2nd quarter	1948 3rd quarter	1948 4th quarter	1949 1st quarter	First quarter 1949/48
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter 1/								
Canada	248,119	2/ 284,431	2/ 28,374	2/ 93,492	2/ 109,828	2/ 52,737	30,118	106
United States	1,673,328	2/ 1,214,482	2/ 246,497	371,930	339,655	256,400	295,105	120
Belgium	46,179	3/ 66,000	-	-	-	-	-	-
Denmark	400,660	267,199	53,572	77,823	72,311	63,493	64,822	121
France	4/5/ 444,888	203,606	26,808	56,246	63,556	56,996	-	-
Germany	792,000	-	-	-	-	-	-	-
Ireland	89,400	63,900	2,412	18,758	28,382	14,348	3,666	152
Netherlands	201,000	2/ 155,823	2/ 18,972	48,356	53,698	2/ 34,797	23,924	126
Norway	24,930	-	3,355	7,187	5,185	-	-	-
Sweden	151,309	197,724	2/ 41,239	54,813	58,010	43,662	-	-
Switzerland 4/	57,760	30,864	2/ 6,658	7,507	8,666	8,033	5,639	85
United Kingdom	44,200	18,772	1,792	7,437	5,690	3,853	4,525	252
Argentina	65,742	-	35,864	24,865	-	-	-	-
Union of South Africa	27,725	48,589	2/ 17,051	2/ 11,224	2/ 8,265	12,049	14,460	85
Australia	6/ 473,032	354,834	104,264	58,329	70,934	121,307	104,743	100
New Zealand - total	7/ 366,049	-	103,600	29,210	58,352	-	-	-
Export gradings	8/ 314,753	2/ 300,533	2/ 91,553	22,234	47,633	2/ 139,113	106,833	117
Cheese 9/								
Canada	114,699	2/ 86,640	2/ 3,587	2/ 31,173	2/ 41,465	2/ 10,415	2,643	74
United States	643,234	2/ 1,098,003	2/ 209,828	356,300	310,230	221,645	255,685	122
Denmark	68,820	2/ 123,237	16,755	41,226	38,580	2/ 26,676	21,614	129
France	4/5/ 363,098	313,840	40,598	93,422	95,159	84,661	-	-
Italy 10/	523,518	11/ 441,000	-	-	-	-	-	-
Netherlands 12/	266,549	213,478	16,045	68,999	2/ 75,491	52,943	35,728	223
Norway	39,067	-	3,886	12,489	9,093	-	-	-
Sweden	71,269	113,967	23,995	36,281	2/ 33,865	19,826	-	-
Switzerland	111,729	101,412	2/ 13,532	30,432	36,193	21,255	16,347	121
United Kingdom 12/	109,000	2/ 58,554	2/ 5,690	17,920	24,416	10,528	16,845	296
Argentina	67,873	-	61,447	45,687	-	-	-	-
Union of South Africa	10,195	19,065	2/ 6,074	2/ 4,058	2/ 3,945	4,988	5,395	89
Australia	6/ 49,111	93,417	21,721	11,467	21,903	38,326	23,513	108
New Zealand - total	7/ 201,272	-	61,510	16,576	-	-	-	-
Export gradings	8/ 194,175	2/ 194,742	64,531	23,108	17,644	2/ 89,459	72,473	112

DAIRY PRODUCTS: Output in principal producing and exporting countries, first quarter (calendar) 1949, with comparisons

Country and product	Average 1934-38	Total 1948	1948 1st quarter	1948 2nd quarter	1948 3rd quarter	1948 4th quarter	1949 1st quarter	First quarter 1949/48
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk (Evap. & Cond.)								
Canada 13/	92,377 2/	296,805 2/	37,349 2/	98,405 2/	105,401 2/	55,650	42,571	114
United States 13/	2,469,535 2/	4,515,450	862,215 2/	1,575,895	1,352,225	725,115	740,950	86
Cuba 5/	32,564	29,165	4,338	5,326	10,790	8,711	-	-
Denmark	40,785	-	9,453	14,131	15,293	-	-	-
France 14/	28,953 2/	53,404 2/	4,304	17,819	19,994	11,287	-	-
Netherlands	304,896 2/	137,133	9,771 2/	44,142	36,253 2/	46,967	53,889	552
Switzerland	14,198	-	-	-	-	-	-	-
United Kingdom	378,560 2/	187,354	24,909	91,840	39,604 2/	31,001	31,091	125
Argentina	-	-	4,171	2,743	-	-	-	-
Australia 6/15/	41,894 2/	133,364 2/	36,335	16,333	27,202	53,494	29,167	80
New Zealand 5/	11,273	16/	-	-	-	-	-	-
Dried milk 17/								
Canada	23,488 2/	82,574 2/	7,669 2/	28,679 2/	29,229 2/	16,997	10,905	142
United States 5/	203,555 2/	858,125	166,260 2/	331,065	210,830	149,970	220,140	127
Belgium	5,500	-	-	-	-	-	-	-
Denmark	2,205	-	1,645	4,365	3,243	-	-	-
France 14/	7,685	4,173 2/	791	1,237 2/	1,094 2/	1,051	-	-
Netherlands	56,438 2/	53,935	1,316 2/	24,867	21,473 2/	6,279	3,294	250
Sweden	1,351	24,733	5,095 2/	7,030	7,966	4,642	-	-
Switzerland	2,381	-	-	-	-	-	-	-
United Kingdom	33,600 2/	77,505	22,669	34,048 2/	15,411	5,377	10,572	47
Argentina	18/	-	5,838	3,163	-	-	-	-
Australia 6/	16,971 2/19/20/	70,528 19/	17,242 19/	9,457 19/	15,036 2/19/	28,793	21,613	125
New Zealand 21/	17,429	16/	-	-	-	-	-	-

1/ Creamery butter. 2/ Revised. 3/ These figures represent controlled production of butter. 4/ Total production. 5/ Less than a 5-year average. 6/ Production year beginning July 1. 7/ Production year beginning April 1. 8/ Marketing year beginning August 1. 9/ Factory cheese. 10/ Total cheese, and includes cheese made from the milk of sheep and goats. 11/ Estimated. 12/ Includes farm cheese. 13/ Both bulk and case goods. 14/ For 1937 only. 15/ Revised to include concentrated milk. 16/ Canned and dried milk reported at 73,346,000 pounds for 1948. 17/ Total dried-whole and dried-skim milk for human consumption. 18/ Quantity small. 19/ Includes infants' food, health beverages, etc. 20/ Production of dried-whole and dried-skim milk was 49,669,000 pounds in 1948. 21/ For 1938 only.

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UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FD 2-49 May 30, 1949

MILK PRODUCTION AND UTILIZATION IN PRINCIPAL PRODUCING COUNTRIES

Milk production in most of the major producing countries of the world in 1948 was somewhat higher than the year before. The larger output reflected the improved feed situation in practically all of the European countries, Australia and New Zealand. These increases more than offset the drop in production in the United States, Canada, Denmark and Sweden.

Significant increases occurred in western European countries, indicating a general recovery from the drought conditions of 1947. Also, in many of these European countries in 1948, the number of dairy cows was higher than in 1947. Denmark and Sweden were the only countries of continental Europe which did not increase milk production in 1948, largely because of a decline in cow numbers and a shortage of imported and indigenous feed supplies.

Favorable growing and producing conditions, together with somewhat higher cow numbers, increased milk production in Australia and New Zealand by 8 percent and 3 percent, respectively, in 1948, compared with a year earlier.

Although a slight upward trend in the number of cows in Canada occurred in 1948, relatively high prices for feed caused farmers to buy cautiously, resulting in a lower yield per cow and a decline in total milk production. In the United States, cow numbers were the lowest since 1931 and production in 1948 was below that of the previous year. Heavy postwar culling of cows, accompanied by high cost of feed in early 1948 and some shift of labor to more profitable alternative enterprises accounted for most of the decline in milk production.

Notwithstanding the feed shortage in early 1948, the yearly production per cow was higher in all countries except Canada. In the United States, the yield per cow set a new high record.

Milk utilization in the different countries in 1948 varied according to the domestic demands of the individual countries. Most governments relaxed or removed their restrictions on milk utilization during 1948. Consequently, the uses to which milk were put in some countries were partially determined by regulation, and in others, partially by the prices paid for the different milk products. Fluid milk consumption generally increased throughout these countries.

The greatest proportion of the milk diverted to factory production continued to be utilized in the manufacture of butter. However, in 1948, somewhat larger quantities of milk were directed into the manufacture of cheese and canned milk than in 1947.

Smaller quantities of milk were fed to livestock in most of these countries in 1948 than in the preceding year. Strong demand for fluid milk resulted in higher prices, thereby reducing the quantity available for feed.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, Elmer A. Reese, Charles C. Wilson, Regina M. Murray and Stanley Mehr.

MILK: Production and utilization in specified countries, 1948 (preliminary) and 1947

Country	Production			Utilization 1/					
	Milk cows 2/	Production per cow	Milk production	Fluid milk 3/	Butter	Cheese	Canned milk	Other uses 4/	Feed
	1,000 head	Pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1948									
Canada	3,701	4,497	16,645	5,610	8,137	998	788	364	748
United States	22,935	5,036 5/	118,337	56,806	30,978	10,920	8,320	8,216	3,097
Austria	1,045	3,225	3,370	1,474	1,204	117	-	-	575
Belgium	850	7,270	6,179	1,885	3,468	133	5	8	680
Denmark	1,475	6,089	8,982	1,684	5,981	652	112	79	474
France	8,000	3,266	26,127	7,082	9,428	2,200	- 6/	147 7/	7,270
Netherlands	1,362	7,250	9,874	3,316	3,900	1,832	301	84	441
Norway	768	3,961	3,042	1,515	980	300	- 6/	60	187
Sweden	1,704	5,754	9,805	3,585	4,762	620	-	128	710
Switzerland 8/	809	5,952	5,004	2,337	666	1,173	31	48	749
United Kingdom	3,583	5,606	20,085	16,130	948	618	433	586	1,370
Australia 9/	2,267	5,307 10/	12,032	2,491	7,853	919	293	476	-
New Zealand 11/	1,714	5,445 12/	9,333	800	6,400	1,733	- 6/	133	267
1947									
Canada	3,697	4,664	17,241	5,885	8,136	1,400	666	337	817
United States	23,825	4,997 13/	121,891	57,295	33,708	11,727	7,891	8,042	3,228
Austria	1,080	3,063	3,308	1,423	1,135	109	-	-	641
Belgium	820	6,649	5,452	1,714	3,020	104	5	9	600
Denmark	1,546	5,855	9,052	1,645	6,221	529	88	84	485
France	7,700	2,987	23,000	5,424	8,300	2,600	- 6/	123 7/	6,553
Netherlands	1,269	6,351	8,060	3,187	2,900	1,221	176	91	485
Norway	795	3,520	2,800	1,506	835	216	- 6/	45	198
Sweden	1,808	5,545	10,027	3,534	5,066	516	-	128	783
Switzerland 8/	822	5,357	4,541	2,183	737	915	34	33	639
United Kingdom	3,540	5,188	18,365	14,986	865	392	309	443	1,370
Australia 9/	2,227	4,993 10/	11,120	2,470	6,986	938	251	475	-
New Zealand 11/	1,658	5,469 12/	9,067	667	6,267	1,844	- 6/	111	178

1/ Includes farm uses. 2/ Includes, for the United States and Canada, cows kept mainly for milk, and for all other countries, cows producing over and above the requirements of the calf. 3/ Includes milk used for cream. 4/ Includes milk used for ice cream, dried whole milk, minor products, waste and balance. 5/ Total production is shown. Production on farms,-115,511 million pounds. 6/ Includes canned milk. 7/ Includes both hand-fed milk and milk sucked by calves. 8/ Production and utilization include goats' milk. 9/ Year ending June 30. 10/ Excludes milk fed to calves. 11/ Year ending July 31. 12/ Utilization of butterfat converted to milk equivalent on the basis of 4.5 percent fat content. 13/ Total production is shown. Production on farms,-119,065 million pounds.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, United States Foreign Service reports, and other information.

MILK: Production and utilization in specified countries, 1934-38

Country	Production			Utilization 1/					
	Milk cows 2/	Production per cow	Milk production	Fluid milk 3/	Butter	Cheese	Canned milk	Other uses	Feed
	1,000 head	Pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
Canada	3,816	4,138	15,789	4,645	8,197	1,411	273	472	791
United States	23,933	4,291 5/	105,416	43,559	43,729	6,449	4,607	4,333	2,739
Austria 6/	1,210	4,630	5,602	3,068	1,212	661	-	-	661
Belgium	967	7,022	6,790	1,433	4,321	163	15	42	816
Denmark	1,658	7,047 7/	11,684	1,433	9,314	331	- 8/	55	551
Finland	1,309	4,268	5,587	2,556	2,735	205	-	-	91
France 9/	8,022	3,921	31,457	7,932	10,933	4,864	- 8/	200 10/	7,528
Germany	10,076	5,270 7/	53,100	16,100	28,100	2,400	-	500	6,000
Italy	3,466	3,968 11/	13,750	3,700	2,700	3,600	24	626	3,100
Netherlands	1,460	7,658	11,180	2,321	5,536	2,291	- 8/	520	512
Norway	807	3,660 7/	2,954	1,124	1,111	489	- 8/	53	177
Sweden	1,922	5,327 7/	10,238	3,283	5,170	782	- 8/	44	959
Switzerland 12/	902	6,297 7/	6,041	2,125	1,497	1,303	- 8/	49	1,067
United Kingdom	3,300	5,583	18,424	11,100	2,800	1,008	647	686	2,183
Australia 13/	2,545	4,629 14/	11,780	1,612	9,466	444 15/	258	-	-
New Zealand	1,807	5,232 16/	9,454	532	6,922	1,754	- 8/	57	189

1/ Includes farm uses. 2/ Includes, for the United States and Canada, cows kept mainly for milk, and for all other countries, cows producing over and above the requirements of the calf. 3/ Includes milk used for cream. 4/ Includes milk used for ice cream, dried whole milk, minor products, waste and balance. 5/ Total production is shown. Milk production on farms,-102,590 million pounds. 6/ For the year 1934. 7/ For the years 1933-1937. 8/ Includes canned milk. 9/ For the years 1937 and 1938. 10/ Includes both hand-fed milk and milk sucked by calves. 11/ For the year 1938. 12/ Production and utilization include goats' milk. 13/ For the years ending June 30. 14/ Excludes milk fed to calves. 15/ Includes dried whole milk. 16/ Utilization of butterfat converted to milk equivalent on the basis of 4.5 percent fat content.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, United States Foreign Service Reports, and other information.

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UNITED STATES DEPARTMENT OF AGRICULTURE
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WORLD OUTPUT OF DAIRY PRODUCTS, FOURTH QUARTER 1948

The output of manufactured dairy products in a number of principal producing countries showed a marked increase in the October-December quarter of 1948 over the corresponding quarter of 1947. While in some countries part of the added output was due to an increase in the total milk production, a considerable amount is attributed to a shift in the utilization of milk. By late 1948, rationing and other quantitative restrictions on milk use had largely disappeared, with the result that milk supplies went largely to the most profitable uses. As prices of fluid milk and cream had generally risen, the controlling factor on such uses shifted from quantitative restrictions to limitations related to the ability or willingness of consumers to pay the prices for fluid milk and cream. Increased availability of other foods, and some lowering of prices also affected consumer choice.

Milk diverted to manufactured products was utilized somewhat differently in the various countries, depending upon price patterns. With relatively high world prices for evaporated and condensed milk, Canada, Denmark, France, Netherlands, and the United Kingdom found this a profitable outlet. In the United States relatively high stocks of these commodities kept production down.

Milk production in the final quarter of 1948, as in the July-September quarter, equalled or exceeded that for the same period a year earlier in nearly all important dairy countries. Total milk output was about 20 percent higher in Denmark and the United Kingdom and commercialized deliveries only were nearly 50 percent higher in France and the Netherlands. As a result of the mild weather during the winter months and the favorable feed situation in Europe and North America, milk production is continuing at relatively high seasonal levels.

Butter production in the fourth quarter of 1948 showed an overall increase of 9 percent when compared with the corresponding quarter of 1947. Higher output was reported in all of the major producing countries of the world, with the exception of Australia, where production declined to 98 percent of the same quarter a year earlier. However, production for the year as a whole was 4 percent higher than for 1947, and represented the largest output of butter since 1943. In New Zealand, butter gradings-for-export in the last quarter of 1948 were only 1 percent above a year earlier. This increase and a slightly higher one in the third quarter were not sufficient to offset the decline in output of the first 6 months, with the result that total production for 1948 in New Zealand dropped 1 percent below the level of the previous year.

Among the continental countries reporting, the largest increase in butter output in the final quarter of 1948 occurred in France. Production there was 70 percent higher than in the final period of 1947, largely the result of the improvement in supplies of commercialized milk which took place in these months. Although output of butter in the first half of the year was disappointing, France's production for the entire year showed a gain of approximately 9 percent over 1947. In the Netherlands also, more milk for manufacturing purposes became available in the fourth quarter of 1948, and the output of butter in this period ran 58 percent above that of a year earlier, while annual production was up 35 percent over 1947.

The improvement in Denmark's dairy situation in the last months of 1948 was reflected in an increase of 9 percent in butter manufactured in the final quarter of the year. However, this increased production was not sufficient to outweigh the low output of the first half of 1948, and production for the year as a whole was 3 percent below that for the preceding 12 months.

In Canada, fourth quarter production was maintained at approximately the same level as that of the fourth quarter a year earlier. For the greater part of 1948, monthly butter production was below the corresponding period of 1947, and output for the entire year showed a decline of about 3 percent in comparison with the previous year. During the October-December quarter, butter production in the United States registered an increase for the first time in 1948, output running 8 percent above the same quarter of 1947. For the entire 12 months, production was 9 percent less than 1947, and with the exception of 1946, was the lowest annual output since 1922. The United Kingdom and Eire also reported increased butter production, both for the final quarter of 1948 and for the entire year.

Cheese production increased in most countries in the fourth quarter of 1948. Overall output in this period was 21 percent above the same 3 months' period of 1947. Of the Southern Hemisphere countries, figures are available at this time for Australia and New Zealand only. Cheese production in the former country in the quarter under review increased 2 percent over the same quarter a year earlier, but for the entire year production decreased 3 percent. In New Zealand, cheese gradings-for-export in the final quarter of 1948 were 8 percent higher, while output for the year as a whole almost approximated 1947 production, being less than 1 percent below the earlier year.

In France, the improved supply situation existing in the closing months of the year was reflected in increased output, cheese production in the final quarter of 1948 exceeding that of the same quarter of 1947 by 106 percent. For the year just ended, output was 28 percent above that for the previous year. Conditions for dairy production in Denmark were more favorable in the last few months of 1948, and in the last 3 months of the year, cheese production increased 53 percent. For the entire 12 months, output increased 24 percent over 1947.

Production of cheese in the United States in the fourth quarter of 1948 was 10 percent higher than that of the corresponding quarter of

1947. However, total 1948 production lagged behind 1947 by approximately 7 percent. This drop was accounted for in the 8 percent decline in American cheese, which makes up the greater part of cheese manufactured in this country.

Canada was the only country among the more important dairy manufacturing countries in which cheese production in the fourth quarter of 1948 fell below the similar period of 1947. This also was the only dairy product manufactured in that country in which an increase did not occur in this quarter. Canadian cheese production in the final 3 months of 1948 dropped 35 percent below comparable 1947. Monthly output throughout 1948 lagged behind the corresponding period of 1947, due largely to the diversion of milk supplies to more remunerative outlets. Production for the year as a whole was only 72 percent of 1947 production.

Canned milk production in the fourth quarter of 1948 showed the smallest increase of any manufactured dairy product, output in this period being approximately 5 percent above that of a year ago. Production in Canada continued at a high level, and in the quarter under review was 20 percent above the corresponding quarter of 1947. This increase occurred mainly in the production of evaporated whole milk, which also is manufactured there in far greater quantity than any other type of canned milk. For the year as a whole, production of all canned milk in Canada ran 18 percent ahead of 1947.

The final quarter of 1948 also saw an increase in the manufacture of canned milk in the Netherlands, output there being 169 percent over the same quarter a year ago. Production for the year was 72 percent higher than 1947.

Other countries reporting increases in output in the fourth quarter were France, the United Kingdom, and Australia, with the annual output in each country likewise being well above that of 1947.

Production in the United States, the heaviest producer of this manufactured dairy product, dropped about 2 percent in the last three months of 1948, compared with the same 3 months of 1947. For the entire year 1948, output of all canned milk in the United States was approximately 1 percent below last year's level.

Dried milk production in the October-December period of 1948 was 21 percent higher than in comparable 1947. The greatest increase was registered in Canada, where output was up 41 percent. Production for the year showed a gain of approximately 17 percent. Total dried milk output in the United States in the fourth quarter of 1948 increased 28 percent over the same quarter of 1947. Although the quantity of dried whole milk manufactured in this period showed a considerable decline, that of non-fat solids, which constitute the greater portion of this country's dried milk manufacture, showed an increase in this quarter of about 46 percent. For 1948 as a whole, production of all dried milk in the United States was down about 1 percent.

In the Netherlands, fourth quarter output of dried milk exceeded that of the same quarter of 1947 by 39 percent. Production for the entire 12 months of 1948 increased about 55 percent over 1947, and was only 4 percent below prewar production.

The only other countries in which increases occurred in the closing quarter of 1948 were France and Australia, output being 39 percent higher in the former, 20 percent higher in the latter. Production for the year in each country also was well above that for 1947.

In the United Kingdom, dried milk production in the last three months of 1948 was 59 percent below the same 3 months of 1947. For the entire 12 months of 1948, however, output was much higher than that of the earlier year, the lower production of the last half of 1948 being more than offset by the heavy manufacture of the first half of the year.

Current Conditions Abroad:-Buenos Aires - The summer flush in total milk production was slow in developing in Argentina as a result of a lack of rainfall in the northern provinces. During January and February, substantial rain fell and pastures quickly revived. Most pastures at present are in good condition.

Sydney:- The outlook for dairy production in Australia in the first half of 1949 is generally good. Dairy cattle numbers show a slight increase and are in sound condition. In the main dairying areas, pastures are good for this time of year, and reserves of fodder have been built up from the satisfactory harvests of the last two seasons.

Wellington:- Many parts of New Zealand have had but little rainfall in the past few weeks. The effect of this has already been felt in these areas.

Copenhagen:- Denmark is looking forward to increased milk production in 1949. Farmers, encouraged by the abundant domestic harvest of fodder roots and the increased availability of oilcakes under ECA financing, began rebuilding their herds in the last six months of 1948, and it is expected that a sizable increase in the number of milk animals will be seen this spring. In addition, the winter has been mild and pastures are reported to be in excellent condition.

Paris:- The milk supply in France is improving rapidly. Protein and other feeds are fully adequate for the present.

London:- The increase in milk production in the United Kingdom which has taken place recently has been due largely to farmers' efforts to increase the number of cows in the dairy herds and to improve yields per cow as a result of better breeding and management. The weather has been very favorable and has helped to simplify the winter feeding problem, while at the same time causing a substantial increase in yield per cow.

Prepared by Floyd E. Davis and Regina M. Murray, and based largely on reports from U. S. Foreign Service Officers.

DAIRY PRODUCTS: Output in principal producing and exporting countries, 4th quarter (calendar) 1948, with comparisons

Country and product	Average 1934-38	Total 1947	Total 1948	1947 4th quarter	1948 1st quarter	1948 2nd quarter	1948 3rd quarter	1948 4th quarter	4th quarter 1948/1947
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter 1/									
Canada	248,119 2/	290,824	283,731	52,[illegible] 2/	28,367	93,531	109,488	52,345	100
United States	1,673,328 2/	1,329,678	1,214,400 2/	237,[illegible] 2/	246,415 2/	371,930 2/	339,655	256,400	108
Belgium	46,179 3/	54,937	66,000 3/	10,498	-	-	-	-	
Denmark	400,660	276,637	267,199	58,422	53,572	77,823	72,311	63,493	109
Eire	89,400	57,968	63,900	13,289	2,412	18,758	28,382	14,348	108
France 4/5/	444,888	187,195	203,606	33,618	26,808	56,246	63,556	56,996	170
Germany	792,000	-	-	-	-	-	-	-	-
Netherlands	201,000	115,642	155,865	22,021	18,973	48,356	53,698	34,838	158
Norway	24,930	17,558	-	3,028	3,355	7,187	5,185	- 6/	123
Sweden	151,309	209,340	-	41,920	41,242	54,813	58,010	- 6/	104
Switzerland	62,170	32,628	-	7,638	5,933	7,507	8,666	-	-
United Kingdom	44,200	15,412	18,772	1,837	1,792	7,437	5,690	3,853	210
Argentina	65,742	112,700	-	33,457	35,864	24,865	-	-	-
Union of South Africa	27,725	37,642	-	11,389	17,054 2/	11,209	8,263	-	-
Australia 7/	437,032 2/	340,677	354,834 2/	123,747 2/	104,264 2/	58,329 2/	70,934	121,307	98
New Zealand - total 8/	366,049 2/	341,109	- 2/	146,138	103,600	29,210	58,352	-	-
Export gradings 9/	314,753	304,347	300,537	137,453	91,562	22,234	47,633	139,108	10[illegible]
Cheese 10/									
Canada	114,699 2/	119,765	86,505	15,525 2/	3,746	30,946	41,675	10,138	65
United States	643,234 2/	1,177,669	1,097,765 2/	201,064 2/	209,590 2/	356,300 2/	310,230	221,645	110
Denmark	68,820 2/	99,207	123,236 2/	17,417	16,755	41,226	38,580	26,675	15[illegible]
France 4/5/	363,098	244,623	313,840	41,140	40,598	93,422	95,159	84,661	20[illegible]
Italy 11/	523,518	434,174 12/	441,000	-	-	-	-	-	-
Netherlands 13/	266,549 2/	141,857	-	28,122	16,045	68,999	75,490	-	-
Norway	39,067	24,259	-	2,701	3,886	12,489	9,093	- 6/	15[illegible]
Sweden	71,269	105,137	-	17,362	23,995	36,281	33,867	- 6/	12[illegible]
Switzerland	111,729	86,299	-	19,960	12,326	30,432	36,193	-	-
United Kingdom 13/	109,000	36,916	59,450	2,912 2/	6,586	17,920 2/	24,416	10,528	36[illegible]
Argentina	67,873	194,481	-	61,506 2/	61,447 2/	45,687	-	-	-
Union of South Africa	10,195	17,619	-	5,534	6,087 2/	4,267	3,946	-	-
Australia 7/	49,111 2/	96,655	93,417	37,5[illegible]	21,721	11,467	21,[illegible]93	38,3[illegible]	10[illegible]
New Zealand - total 8/	201,272	205,093	-	88,275	61,510	16,576	-	-	-
Export gradings 9/	194,175	195,416	194,7[illegible]	83,030	64,531	23,108	17,544	89,461	10[illegible]

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DAIRY PRODUCTS: Output in principal producing and exporting countries,
4th quarter (calendar) 1948, with comparisons

Country and product	Average 1934-38	Total 1947	Total 1948	1947 4th quarter	1948 1st quarter	1948 2nd quarter	1948 3rd quarter	1948 4th quarter	4th quarter 1948/1947
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Canned milk									
Canada 14/	92,377	2/ 249,318	294,185	46,384	2/ 35,025	98,059	105,452	55,649	120
United States 14/	2,469,535	2/ 4,575,726	4,515,485	2/ 741,458	2/ 862,215	2/ 1,575,930	2/ 1,352,225	725,115	98
Cuba	5/ 32,564	31,362	-	7,971	4,338	5,326	-	-	-
Denmark	40,785	38,763	-	8,794	9,453	14,131	15,293	-	-
France	15/ 28,953	45,086	53,405	5,922	4,305	17,819	19,994	11,287	191
Netherlands	304,896	79,562	136,905	17,363	9,771	44,143	36,253	46,738	269
Switzerland	14,198	2/ 15,330	-	2,840	-	-	-	-	-
United Kingdom	378,560	131,174	187,175	15,322	24,909	2/ 91,840	2/ 39,604	30,822	201
Argentina	-	12,642	-	4,610	4,171	2,743	-	-	-
Australia	7/16/ 41,894	2/ 124,685	133,382	2/ 52,033	2/ 36,353	2/ 16,333	27,202	53,494	103
New Zealand	5/ 11,273	17/ -	-	-	-	-	-	-	-
Dried milk 18/									
Canada	23,488	2/ 69,963	81,719	11,862	2/ 7,704	28,840	28,418	16,757	141
United States	5/ 203,555	2/ 842,829	831,495	2/ 117,347	2/ 166,260	2/ 304,435	2/ 210,830	149,970	128
Belgium	5,500	5,509	-	-	-	-	-	-	-
Denmark	2,205	11,393	-	1,570	1,645	4,365	3,243	-	-
France	15/ 7,685	2,621	4,173	704	864	1,237	1,093	979	139
Netherlands	56,438	34,791	54,012	4,560	1,316	24,866	21,473	6,357	139
Sweden	1,351	23,382	-	3,790	5,095	7,048	7,966	-	6/ 136
Switzerland	2,381	5,693	-	1,207	-	-	-	-	-
United Kingdom	33,600	55,372	77,057	13,081	22,669	2/ 34,048	2/ 14,963	5,377	41
Argentina	19/ -	17,637	-	6,195	5,838	3,163	-	-	-
Australia	7/ 16,971	2/20/21/ 65,110	20/22/ 70,497	2/20/ 24,001	2/20/ 17,242	2/20/ 9,457	2/20/ 15,036	28,762	120
New Zealand	23/ 17,429	17/ -	-	-	-	-	-	-	-

1/ Creamery butter. 2/ Revised. 3/ These figures represent controlled production of butter. 4/ Total production. 5/ Less than a 5-year average. 6/ Based on October and November production. 7/ Production year beginning July 1. 8/ Production year beginning April 1. 9/ Marketing year beginning August 1. 10/ Factory cheese. 11/ Total cheese, and includes cheese made from the milk of sheep and goats. 12/ Estimated. 13/ Includes farm cheese. 14/ Both bulk and case goods. 15/ For 1937 only. 16/ Revised to include concentrated milk. 17/ Canned and dried milk reported at 65,924,000 pounds for 1947. 18/ Total dried-whole and dried-skim milk for human consumption. 19/ Quantity small. 20/ Includes infants' food, health beverages, etc. 21/ Production of dried-whole and dried-skim milk was 44,988,000 pounds in 1947. 22/ Production of dried-whole and dried-skim milk was 49,638,000 pounds in 1948. 23/ For 1938 only.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, United States Foreign Service Reports, and other information.